Configuring Rollup Lists

Lists · https://learning.pcrecruiter.net/site/docs/lists/configuring-rollup-lists/

Rollup Lists are PCRecruiter's multi-purpose tool for grouping Name, Company, and Position records into lists. These lists can be used for organizing and sorting, call lists, Sequences, mass-changes, emails, and other tasks.

Configuring Rollup Lists

Choose any Rollup list

1. Click on the **Rollup** tab on the main toolbar to bring up the list of rollups.
2. Every rollup list can contain Names, Companies, and Positions. Each record type is stored in a separate area of the list. Click on the **number** under the record type of any rollup list to access the records.
3. Choose the **Configure** icon from the dropdown list in the active frame and a Configure Rollup List window will pop up.
4. From this window you can choose any of the following charms located on the left side:
    1. **Layout** charm allows you to choose which fields you'd like displayed by clicking in the "Click to set field" area and choosing from the dropdown list.
        - You can decide where they appear on the screen by simply dragging and dropping into the desired location.
        - You can delete a field by clicking into it and selecting **Delete**.
        - You can choose from two sort by options by clicking the down arrow and choosing from that list.
        - Select the number of rows per page by typing it right into the box. (There is a max of 100 records per page).
        - You can choose which features are available to you in the "I want to…" action dropdown list by checking or unchecking the corresponding boxes.

2. **Stage Setup** charm allows you to customize the Rollup Stages with a description and icon of your choice, assign it an activity type and create an automation plan. See below for more information on configuring stages.
3. **Stage Activity** charm is used to create a set of stages per Rollup call list type. (*This is not normally used, we recommend your admins use Global Rollup Stages as an alternative. Learn how to create Global Rollup Stages here).
4. **Automation** charm allows you to add an automated process when someone is moved to a specific stage on the rollup list. Select the Username from the dropdown menu and the name of the Automation Plan. Learn more about creating Rollup Automation Plans here.

Configuring Rollup Stages

Rollup lists allow you to select a symbol as a visual indicator of where the record is in your process. Each type of Rollup (Company, Name or Position) can have its own set of stages; you can alter the label for each symbol as well as the image displayed to reflect your process or terminology. Additionally, each stage can be configured to automatically write an activity, display the New Activity window in which you can add an activity, or execute an automation plan. If you are using Global Rollup Stages, click here to learn how to configure your stages.

1. Select **Rollups** from the main navigation toolbar.
2. Select any **Rollup List**.
3. From the action dropdown, select **Configure**.
4. Click **Stage Setup**.
5. Select the **Rollup Type** (Company, Name or Position).
6. For each Stage:
    1. Click the **Gear Icon** to choose which image you would like displayed when the corresponding stage is selected (This option is not available for the Clear Status stage).
    2. Enter a **Description**. The text entered is the label that will appear when selecting the stage (This option is not available for the Clear Status stage).
    3. Select the **Default Activity Type**. This is the Activity Type that will be written to the record or displayed as a default if you configure the stage to automatically write or pop up a new activity

window (Learn how to create Activity Types here).

4. Choose your **Write Activity** preference (Note: This activity will have appended text listing the Stage the record was changed to and the Rollup List on which the stage was changed):
    1. **Default Activity:** Automatically writes the activity selected in the Default Activity column
    2. **Popup New Activity:** Pops up the Add Activity window allowing you to add notes and schedule follow-ups prior to saving (The selected Default Activity will be displayed).
    3. **Automation Plan:** Automatically writes the selected Default Activity as well as runs the selected Automation Plan. If the Automation plan is set to write an activity and a Default Activity is selected, this will result in two activities being written. (Learn how to create Automation Plans here)
    4. **No Activity:** Prevents an activity from being written when the stage is selected
5. Select the **Merge Plan** preference to carry forward items with this symbol when using the Merge Plan feature (The Clear Status stage will always be set to *'Yes'*)
    1. **Yes:** Records with this stage will remain on your plan to be carried onto the next day
    2. **No:** Records set to a 'No' stage will fall off of your plan but remain on your rollup list (Useful for people not interested, unable to contact, etc.)

7. Click **Save**.

Please note that Rollup Stages can be customized by individual users. If the Stages should be applied to other users' views, you must copy the settings to the other users. See "Modifying Users" here.